

Tin Industry Review 2017



Answering all your questions on the
global tin industry outlook.

A market-leading report for tin users,
producers, explorers and investors.

Introduction

International Tin (formerly ITRI) is the main source of global tin industry statistical and market information, based on its networks of member companies and regular large-scale industry surveys.

In recent years it has expanded its representative office in China, giving first-hand access to the world's largest market and producing country.

Its long history in applications technology provides unique insights into market opportunities and substitution threats.

Tin Industry Review 2017

Available immediately

This is the fifth edition of a series of major studies on the tin outlook published by International Tin since 2008. The 124 page printed report and electronic PDF file is backed up by data tables in Excel and charts in pdf format. All of the key questions which will determine the outlook for the industry are considered in depth and answered objectively:

- Will substitution and economisation continue to impact tin demand or can new applications more than offset these negative factors?
- Will mine supply from the established big producing countries, China, Myanmar and Indonesia, be maintained or decline?
- While some big companies are investing heavily, can juniors with new projects obtain financing to get them off the ground?
- Will recycling play an increasing role in balancing supply and demand?
- Are known stocks of tin sufficient to cover expected supply deficits in the coming years?
- How does the cost of mining define the likely tin price range in the next five years and beyond?

The main contributors to the report are all senior International Tin staff with many years of combined experience in tin. They are available to subscribers to present and discuss their findings as part of the service package. Additional confidential consulting work for individual customers can also be provided on request.

For further information on the Tin Industry Review contact:

Tom Mulqueen on +44 1727 871330

e-mail tom.mulqueen@internationaltin.org

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The Review includes...

EXECUTIVE SUMMARY
Navigating Global Uncertainty,
The Outlook for Tin Usage, Tin Production,
Investment Market Balance
and Price Outlook

CHAPTER 1:

Outlook for Tin Usage

- Overview
- Demand Trends
- Recent Market Trends
- Technology Threats and Opportunities
- Forecast to 2018 and Beyond

CHAPTER 2:

Current and Future Tin Supply

- Overview of Recent Trends
- The Top Ten Refined Tin Producers
- Primary Tin Smelting and Refining
- The World's Leading Tin Mines
- Global Tin Resources and Reserves
- China Tin Industry under Supply-Side Reform
- Indonesia Continues Regulatory Clampdown
- Slow South American Revival Anticipated
- Conflict Minerals Issues
- Responsible Tin Supply
- The Global Project Pipeline

- Trends in Tin Mine Production Costs
- Secondary Refined Tin Production
- The Outlook for Tin Production to 2021 and Beyond

CHAPTER 3:

Market Balance and Price Outlook

- Tin Price History
- The Supply/Demand Position and Stock-Levels
- Floor and Equilibrium Prices
- Regional Developments
- Forecast Supply/Demand Position and Prices

Appendix I:

- Statistical data

Appendix II:

- Summary of technology threats

Appendix III:

- Cost model definitions and production data.

Who will benefit from the report?

Tin users

The report helps inform pricing and hedging decisions as well as underpinning long-term planning of product development.

Investors in new mine projects

The report identifies the need for increased investment in sustainable mine supply. Using the International Tin Production Costs Model we can identify where new projects fit into the future industry costs distribution, while the price forecast scenarios can be used to calculate IRRs.

Investment funds

Tin has outperformed other commodity assets in the last decade, but a lack of transparency in the market can be a deterrent for many investors. This report helps plug the information gap



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Tin Industry Review

(2017 edition)



Unit 3, Curo Park Tel: +44 (0) 1727 875 544
Frogmore Fax: +44 (0) 1727 871 341
St. Albans Email: info@internationaltin.org
Hertfordshire Web: www.internationaltin.org
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